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Regional decarbonisation proposal facing high-profile opposition

CLASSIFICATION SOCIETY LLOYD'S Register and the Liberian International Ship and Corporate Registry have expressed opposition to a proposal for regional decarbonisation regulations on international shipping.

The condemnation by the two industry staples come after a declaration of approval by certain shipping industry executives of the European Union Emissions Trading System, in a stark break with the industry's traditional uncompromising opposition to unilateral and regional measures.

Shipping is not part of the EU carbon market but the European Commission has vowed to include it and the European Parliament has officially proposed it.

Maersk Tankers chief executive Christian Ingerslev said a Global Maritime Forum working group he had been a part of wanted it to support regional decarbonisation regulatory efforts, starting with the Emissions Trading System.

Torvald Klaveness chief executive Lasse Kristoffersen, who was part of another GMF working group, also urged the industry to embrace the fact that the ETS is happening and engage in the process.

Though it did not name the executives, Lloyd's Register has distanced itself from the remarks.

"Lloyd's Register is a strategic partner of the Global Maritime Forum, but does not support these or any calls for greater regional regulation in support of decarbonisation," it said in a statement.

The group's chief executive Alastair Marsh said that it is in the best interest of "all shipping stakeholders" for the International Maritime Organization to set emissions regulations.

The Liberian International Ship and Corporate Registry said it opposes the European Parliament's proposal to include shipping in the carbon market. Chief operating officer Alfonso Castillero said the registry understands the need to reduce emissions from shipping.

"However, at least for international shipping, it is vital we work toward one set of requirements established by the IMO, avoiding the creation of a fractured system of regional requirements that reach beyond their own waters, and assuring a unified global effort to confront this important issue," he said.

The registry said that if the Emissions Trading System is introduced, it should be limited only to intra-EU voyages and exclude voyages that cover non-EEA waters.

That echoes the position of the World Shipping Council, the premier liner lobby, that made the case for an intra-EU ETS only, in September.

"While the Emissions Trading System has been described as a `regional' system, bringing international shipping into that system using the [EU Monitoring, Reporting and Verification system] scope would, in effect, regulate the operation of ships on several of the world's seas and oceans, including on the high seas and in waters adjacent to non-EU nations," said Mr Castillero.

The European Parliament last month proposed shipping's inclusion in the Emissions Trading System as part of a broader revision of the EU's shipping emissions reporting regime.

While the European Commission has committed to include shipping in the carbon market, it wants to do that through a wider review of the system and as a standalone legislative process, unlike what the Parliament is trying to do.

Johannes Hahn, the Commissioner for budget and administration, has said his colleagues do not believe the revision of the Monitoring, Reporting and Verification system is the right tool to introduce a carbon market or other proposed operational measures on shipping.

WHAT TO WATCH

Australia's coal exports to China may be hit hard amid tensions

WHILE coal exports from Australia are unlikely to be materially impacted this year from China's reported ban, volumes in 2021 could be hard hit, according to pricing agency S&P Platts.

It estimates that up to 32m tonnes of thermal coal could be displaced in the first quarter of next year alone.

China could look to Indonesia for some volumes, but since Indonesian coal is of a lower calorific value than Australian coal, supplies from Russia or South Africa may be required, according to the agency's senior coal analyst Matthew Boyle.

Despite China's coal import quotas being exhausted at some ports since as early as April, Australia's coal exports have held up, he said.

"Platts Analytics believes part of any rationale for a potential ban on Australian coal imports by China is not only political, but also due to the year-on-year increase in Australian coal exports to China so far."

In the first eight months of the year, Australia exported 38.6m tonnes of thermal coal and 31.6m tonnes of metallurgical coal to China, which represents an increase of 4.6m tonnes and 8.5m tonnes, respectively, compared with the same period in 2019.

In August, however, imports from Australia started to slow.

According to Torvald Klaveness, high levels of Chinese imports early on in the year have led to strict enforcement of import quotas.

As a result, the average waiting time for capesizes and panamaxes around the Bohai Rim area carrying Australian coal jumped to more than 70 days, its head of research Peter Lindstrom said. That compares with the 10-day clearing time in a typical year.

Soaring Chinese coal prices coupled with low global prices has created “a very profitable arbitrage opportunity” for imports into China, he pointed out, adding that he believed demand for seaborne coal into China would increase in the coming months, and two scenarios could play out.

Either Beijing could relax import quotas for the rest of the year to bring domestic coal prices down from what it calls “the red zone,” or the widening arbitrage could justify sourcing vessels today, idling them for the rest of the year, and discharging cargo in the new year when import quotas are renewed, he said.

In the short term, Indonesia and Russia are the most likely beneficiaries of higher demand for seaborne thermal coal, Mr Lindstrom said, while in the longer term, more coking coal shipments could potentially emerge from more distant sources such as Canada and the US, which would be a bullish scenario for dry bulk shipping.

China has looked to Australia for most of its coking coal supplies, with volumes also sourced from Mongolia, Russia and Canada, according to Platts. The US has also been a small supplier.

Platts believes that at least for 2020, Australian exports are unlikely to be affected by any ban, as steel mills tend to stick with their preferred quality, despite cheaper domestic alternatives. Thus, they may still tap the seaborne market.

It estimates that China will import 214m tonnes of thermal coal in 2020. Including coking coal, the figure rises to 288m tonnes.

Despite a slowdown in most countries because of the coronavirus, China has been producing steel at ever-higher levels.

The World Steel Association estimates that the Chinese economy is rapidly approaching full normality.

While China’s steel demand is expected to increase by 8% this year, aided by government infrastructure stimulus and a strong property market, the rest of the world is forecast to see a contraction of 13%. Overall, global demand will sink by 2.4% in 2020, rebounding by 4.1% next year, but China’s steel output is forecast to remain flat, the group said in its latest short-term outlook report.

Global miner BHP, which had forecast a contraction in global steel production due to coronavirus, was reported to have received notice from customers about deferring or cancelling cargoes.

Sources also reported that some Australian cargoes were being diverted to India, but one local trader told Lloyd’s List that the country did not have the appetite to absorb all the shipments that would have been diverted from China.

OPINION

Soul-searching for Australia at the coalface of China’s pandemic politics

“YOU can sell your soul for a pile of soybeans, or you can protect your people,” US Secretary of State Mike Pompeo warned Australia last year as diplomatic relations between China and Australia continued to decline in the wake of security spats.

Australia doesn’t actually sell soybeans in any great quantity, but it does sell rather a lot of coal, $56bn to be precise, which goes way to explaining why the sight of at least 27 coal-laden bulk carriers waiting at anchorage off China’s northern Caofeidian and Tangshan coal terminals is making security analysts and economists equally uneasy.

Shipowners should also be paying attention.

Right now most are just pleased that the 10-week delay in shipments from Australia’s north Queensland coast has served as an earnings boost, briefly lending supporting to Pacific charter rates.

But these ships waiting so long to discharge serve as a reminder that the fragility of the current demand dynamics are more vulnerable to political manoeuvring than they have been for many years.

The exact reasons for delays aren't clear. Initially, delays were explained away as congestion due to stockpiling and stricter implementation of coal import quotas. Then it emerged this week that Australian miner BHP's Chinese customers have asked them to defer metallurgical coal shipments.

The security hawks immediately jumped to the conclusion that this was a clear sign of politics at play, and not without good reason.

China has already taken a range of actions against Australian exporters this year, including imposing prohibitive tariffs on barley, suspending some meat imports and launching trade investigations into wine.

Tech may have garnered the international attention when it comes to trade spats recently, but China has used trade as a diplomatic tool in many sectors before and given the anger and mistrust between the countries that has been bubbling under the surface for years, a diplomatic coal black would not be without precedent.

Analysts have already noted a shift in political agenda that has seen China taking more coal from Russia and Mongolia over Australia which has been very vocal about their national security concerns, voiced by politicians keen to position themselves as defending their domestic economy.

They should be wary of pushing such rhetoric too far.

More than two-thirds of met-coal Chinese imports in the first half of 2020 were from Australia, so if China is shunning Australia's exports that's bad news for Australia.

China, meanwhile, has its own supply of domestic coal and if the increased Russian and Mongolian connections fall through Indonesia and South Africa could easily make up for any shortfalls from Australia.

Of course, the decline in Australian coal exports might have nothing to do with diplomacy.

Slower imports could also be a signal that the strength and pace of the Asian tiger's post-pandemic economic recovery is weaker than first thought.

Either way, these are trends that have an impact for shipping supply chains.

Such calculation are a delicate balance beyond the control of shipping, but as China prepares to advance a new export control law that would ban Chinese suppliers from dealing with specific foreign companies on national security grounds, taking a page from the US crackdown on Huawei Technologies and its peers, the shipping industry looks on with growing concern.

US foreign policy sent tanker rates soaring above $300,000 daily a year ago, oil-price wars did the same six months later.

If pandemic politics from China threatens to destabilise bulk carrier trades this could be one unexpected reconfiguration of global supply chains too far this year.

ANALYSIS

Shipping's scrubber gamble 'looks like yesterday's solution'

SHIPPING's multi-billion dollar investment in scrubber technology, in a bid to lower fuel costs, now looks like a losing gamble in light of the industry focus on green issues, the Connecticut Maritime Association conference has heard.

"As decarbonisation takes centre stage in any global energy debate, scrubbers are looking very much like yesterday's solution," said Michelle Wiese Bockmann, analyst and markets editor at Lloyd's List.

That conclusion will make uncomfortable reading for many investors and while hindsight is always 20/20, Ms Bockmann explained why the collective $6bn investment in this technology looks like "such a bad bet for shipowners less than two months later".

Ultimately, the real aim of her hindsight is to see how that "bad bet" will likely impact the maritime industry for decades ahead as industry finances fall short of supporting decarbonisation targets arising later this century.

The estimate of $6bn is based on “a very rough figure” of $2m each for the installation of scrubbers on some 3,000 ships worldwide.

“In most cases, the cost is much higher, but this is around $6bn spent essentially on an exercise that was not to make shipping greener, but to lower fuel costs,” she told the virtual conference.

The idea of saving on fuel came from the belief of investors that the spread between the price of compliant low-sulphur fuel and non-compliant high-sulphur fuel would more than compensate for the cost of installing scrubbers — and fast.

“So back in November 2019, these scrubbers looked like they were a sure bet against higher fuel prices promised with the switch to lower sulphur bunkers,” she said, noting in some cases that “the payback time was seen at less than two years”.

But all of that was based on the pre-pandemic assumption of a $200 price spread between cheaper high-sulphur fuel and more expensive very low sulphur fuel oil or gasoil — a price spread that would guarantee the investment in scrubbers.

The problem was the pre-pandemic assumption that the difference in price between the two would be at least $200 per tonne.

But the assumed profitable spread, which briefly reached $300 per tonne toward the end of 2019, “dramatically fell” — a point she underscored with reference to the “21-year low” that oil prices hit in the middle of 2020, with little change since then.

“There were many factors at play that caused this: Covid, of course, the Saudi–Russian oil price war, lockdown measures that crippled global demand and the consequential Opec cuts that reduced medium sour crude on the market.”

All of those were factors that few investors could have anticipated in the run-up to the introduction of the International Maritime Organization’s new sulphur rules on January 1 this year — the coronavirus pandemic in particular.

But another factor that seems to have gone altogether unnoticed, though, was clever refiners and traders.

Investors in scrubbers “underestimated” how much compliant fuel would be available. Instead of putting effort into producing high-cost compliant fuel for an uncertain market, however, refiners and traders “were able to blend sufficient 0.5% sulfur fuels to meet demand”.

Tanker supply side bodes well for rate recovery

LOW tanker supply could be beneficial for a recovery in freight rates, according to analysts.

Although crude tanker rates will remain under pressure this quarter, and into the “seasonally soft” first quarter of the year, an improvement could well be seen thereafter, Jefferies said in a quarterly report.

“The supply picture for tankers remains extremely positive, with the lowest orderbook-to-fleet ratio since 1997 at roughly 9%,” it said.

“The interplay between the unwinding of floating storage demand, destocking of both offshore and onshore inventories, and the speed at which near-term oil demand recovers will continue to be the key driver of tanker charter rate strength or weakness and volatility,” it continued.

The floating storage trade was now closed, and demand continued to lag, according to Jefferies, with very large crude carrier spot rates at $20,000 per day.

Cleaves Securities noted that oil tanker rates were hovering around operating cost levels because of a rout in oil supplies, and expects a cyclical trough in the third quarter of 2021, before “significant improvements” thereafter. Some short-lived gains could also be seen in the fourth quarter of this year.

With the second wave of coronavirus affecting a number of countries around the world, Cleaves expects oil demand growth to hang in the balance.

It expects oil tanker demand to contract by 5.9% in 2021, recovering by 8.8% in 2022. That compares with growth of 4.8% this year.

Cleaves also anticipates an unwinding of floating storage back to normalised levels of 2% of the fleet during the first half of 2021.

It expects scrapping will remain below levels seen during the last trough in 2018, when some 20m dwt was eliminated, it said in its quarterly report, with 4m dwt forecast to be removed this year, 12m dwt in 2021 and 9m dwt in 2022.

Maritime Strategies International also expects the new coronavirus cases to extend the period of weakness in the market potentially out to the first quarter, and may even impact the second quarter of next year.

"The recovery in underlying oil demand is by no means assured and is likely to waver," the London-based consultants said in a monthly report.

The product tanker market, meanwhile, is expected to strengthen in the coming weeks, according to Jefferies, as inventories have been substantially drawn down from 104m barrels to 34m barrels, US Gulf refinery utilisation ramps back up from the recent hurricanes and storms, and new refining capacity in the Middle East comes online.

Regional imbalances could also support demand as some European refineries, closed temporarily because of coronavirus restrictions, could remain shut, it said.

On the supply side, the average age of the fleet is 11.4 years, while the orderbook-to-fleet ratio is just 6.7%, the lowest on record since 1996, according to Jefferies, making it more "manageable".

It expects net fleet growth of 3.4% in 2020 and 2.7% next year. That compares with 4.6% in 2019.

Meanwhile, 23% of the fleet is already over the age of 15 years, providing opportunities for increased scrapping.

MARKETS

Prolonged peak season keeps box spot rates steady

SPOT rates on the major container trades have stayed firm as demand held strong in an unprecedented extension of the industry's traditional peak season.

The post-Golden Week period would usually signal a significant slump in rates as cargo numbers begin to tail off. However, despite showing signs of weakening slightly, volumes are ticking over as container shipping continues to bounce back from a pandemic-induced slump.

Transpacific and Asia-Europe volumes both remain steady with reports of utilisation levels still in the high nineties on respective services out of the big Asian hubs, according to the Shanghai Shipping Exchange.

This week's Shanghai Containerised Freight Index showed spot rates down 0.2% to $3,841 and 0.1% to $4,619 per feu on the China–US west coast and China–US east coast, respectively.

The biggest drop was reported on the China–northern Europe route, falling 5.7% to $1,084 per teu, while China–Mediterranean rates increased by 3.1% to $1,239 per loaded 20 ft box, in a six-year high for the westbound trade.

The strength of demand that continues to keep rates hovering at near all-time highs on the SCFI, is reflected too by the number of port calls out of China's two port majors Shanghai and Yangshan.

Data from Lloyd's List Intelligence shows that in the latest reporting week (week 41), port calls were recorded at 406 this year against the 381 in the corresponding week of 2019, in what was its busiest calling period since early August and an indication of how demand had still to tail off even after Golden Week.

The SCFI's Comprehensive Index, weighted on 11 trades out of the world's largest container port, also made gains.

While spot rates on mainline routes held firm, there was also further rises on routes to West Africa, South America and Australia/New Zealand, where spot prices climbed to new highs.

BIMCO chief shipping analyst Peter Sand noted how the uncertainty and disruption to trade flow at the hands of the pandemic, which has prompted these rises, could result in elevated freight rates for the next three to four months.

"There could be some volatility in prices if volumes fall abruptly. However, blank sailings may limit this downward volatility," he told analyst S&P Global Platts.

The coming weeks will see a number of blanked sailings come into effect as carriers look to mitigate for a drop in demand as the peak season finally draws to close.

"Now we enter the period where carriers are going to struggle to keep rates maintained, especially with demand tailing off and cargoes for next week looking lower already" one freight forwarder told Platts.

Boxship tonnage providers benefit from carrier bonanza

CONTAINERSHIP tonnage providers have recovered from the low charter rate environment earlier in the year and have benefited from carrier customers' increased freight rates.

Evangelos Chatzis, chief financial officer of Danaos, said that while there was often no direct correlation between freight and charter rates, the market was now strong on the back of higher demand from carriers.

"In a market where demand is booming you should expect both to go up, but there is no necessary correlation," he told a Capital Link conference webinar. "We've seen up to 100% increases in charter rates from where they were during the pandemic.

"We expect that to soften towards the end of the fourth quarter, but what is important is that our customers, the carriers, have managed to effectively and efficiently manage capacity to address the pandemic and have managed to keep box rates at healthy levels."

The pandemic instilled a new discipline among carriers, partly by accident, as carriers reduced capacity. Thinking things would be worse than they were, the capacity cut was greater than the decline in demand, forcing up freight rates.

"You want your clients to make money so you can make money," said Global Ship Lease chairman George Youroukos. "But when liner companies make a shitload of money like they do now, this is not just an adjustment but a completely different picture to what we have been used to."

Carriers had realised that fighting for market share had only resulted in losses, he said.

"The new strategy of restraining themselves from over-ordering ships and ending up with overcapacity is giving them profits, and I think this is what we will continue to see," Mr Youroukos said. "When we have a situation where carriers are making so much money that will drive the charter market quite high."

The surge in charter rates could see carriers turn towards longer term charter periods, particularly for larger ships, according to Jerry Kalogiratos, chief executive of Capital Product Partners.

"As rates start soaring, carriers will be forced to consider longer-term charters to control the rise of rates," he said. "People want to be able to lock-in ships and have visibility. I think liner companies will be forced to lock-in for a longer period."

Mr Youroukos questioned whether carriers would need cheaper long-term charters when they were making so much money. The simple maths meant that a 5,000 teu widebeam containership could earn $20m on a 45-day round trip at current freight rates.

"Today's charter rate is about $22,000 a day for this type of vessel," he said. "Adding $5,000 to the charter rate would only be $225,000 for that round voyage."

He added that when a ship was chartered for a year, the $22,000 per day rate only amounted to $8m a year in charter costs.

"As you can see, that year's charter hire can be made in one voyage. Assuming that in a year a ship can make eight to nine round voyages, the rest is profit. We have to think about this sort of calculation when thinking about the future.

"I don't really know if carriers will continue to have the discipline to make these stellar returns, but if common sense prevails they should keep the strategy that has achieved these returns."

Australia ships less LNG as prices fall

AUSTRALIA'S liquefied natural gas exports fell month on month in September as two of its largest export projects cut back on output amid a lower price environment.

The gas-rich country exported 6.2m tonnes of LNG or 91 cargoes last month, down from 6.6m tonnes or 96 cargoes in August, data from Australia-focused research agency, EnergyQuest showed.

This came on the back of a big turnaround scheduled for the Woodside Energy-operated North West Shelf project, which shipped five less cargoes last month, the agency suggested.

It also flagged a decrease in Chevron's Gorgon LNG's shipments.

Gorgon LNG, which saw its second train enter into extended maintenance that ran for months, shipped two fewer cargoes in September.

Shell's Prelude floating LNG has likewise suspended operation and is not expected to resume full production before the end of this year, S&P Global Platts separately reported.

EnergyQuest estimates 20 cargoes loaded from Australian projects were held back from sailing, while awaiting final destinations, down from 35 and 21 seen in August and July.

Eight of the delayed cargoes in September were loaded at NWS.

Australia's LNG exports to China were priced at $5.19 per million British thermal unit this August, down from $8.43 per mmBtu for the same month last year.

Cargoes shipped to South Korea and Japan in August also fell to $5.75 per mmBtu and $6.24 per mmBtu respectively, down from $8.93 per mmBtu and $10.27 per mmBtu a year ago.

IN OTHER NEWS

Eastern Pacific joins biofuel bunker trial with GoodFuels

IDAN Ofer's Eastern Pacific Shipping has entered a partnership with GoodFuels, a sustainable fuels provider, to test and scale biofuel as ship bunker in yet another high-profile push for sustainable fuels amid pressure on shipping to decarbonise rapidly.

Eastern Pacific's 2010-built, 47,400 dwt medium-range product tanker Pacific Beryl was supplied with 250m tonnes of a residual-fuel equivalent biofuel oil.

Its performance will be tested and analysed on board the ship, as well as on other Eastern Pacific-managed vessels in the future, the Singapore-based company said.

Scorpio Bulkers continues to reduce fleet

SCORPIO Bulkers, a US-listed owner and operator, has announced the sale of an ultramax.

The company sold the 2016-built SBI Hera for $18.5m, it said in a statement, hours after it announced the sale of two other ultramaxes.

It marks the company's sixth vessel disposal in the space of just under three weeks. Delivery of the vessel, which was sold to an unidentified unaffiliated third party, is expected in this quarter of the year.

UN struggles to gain access to dangerous wreck off Yemen

THE United Nations has yet to be given access to the decaying tanker Safer which threatens a major oil spill in the Red Sea off Yemen.

UN sources said it could take another seven weeks to finalise a deal with Yemen's Houthi rebels, who control the area, because of coronavirus delays and logistical challenges, Reuters reported.

Experts have called for the 1.1m barrels of oil to be moved from the 45-year-old vessel, which has not been maintained since war broke out five years ago.

For classified notices please view the next page.

Department for Transport

THE GREAT YARMOUTH THIRD RIVER CROSSING DEVELOPMENT CONSENT ORDER 2020

THE INFRASTRUCTURE PLANNING (ENVIRONMENTAL IMPACT ASSESSMENT) REGULATIONS 2017

NOTICE OF A DECISION ON AN APPLICATION FOR AN ORDER GRANTING DEVELOPMENT CONSENT FOR EIA DEVELOPMENT

The Secretary of State for Transport ("the Secretary of State") gives notice under regulation 31(2) of the Infrastructure Planning (Environmental Impact Assessment) Regulations 2017 that a determination has been made on an application made by Highways England ("the Applicant") for development consent under the Planning Act 2008 ("the 2008 Act") for Environmental Impact Assessment development.

The DCO as applied for would grant development consent for the construction, operation and maintenance of a new crossing of the River Yare in Great Yarmouth. It would comprise a new dual carriageway road, including a road bridge across the river, linking the A47 at Harfrey's Roundabout on the western side of the river to the A1243 South Denes Road on the eastern side ("the Proposed Development"). The Proposed Development would feature an opening span double leaf bascule (lifting) bridge across the river, involving the construction of two new 'knuckles' extending the quay wall into the river to support the bridge.

In addition, the DCO would contain compulsory acquisition powers in relation to land and rights that would be required for the purposes of the development.

The Secretary of State has determined, following consideration of the report of the Examining Authority which conducted an examination into the Application, that development consent should be granted and has decided, therefore, to make an Order under sections 114, 115 and 120 of the 2008 Act.

The statement of reasons for deciding to make an Order granting development consent, which has been prepared by the Secretary of State under section 116 of the 2008 Act and regulation 31(2) of the Infrastructure Planning (Environmental Impact Assessment) Regulations 2017, containing the content of the decision, the requirements imposed in connection with the development, the main reasons and considerations on which the decision is based including relevant information about the participation of the public, a description of the main features to avoid, reduce and offset any major adverse effects of the development and information regarding the right to challenge the decision and the procedures for doing so, is published on the Planning Inspectorate`s web-site:

https://infrastructure.planninginspectorate.gov.uk/projects/eastern/great-yarmouth-third-river-crossing/

It is also available in the following location:
The Planning Inspectorate
National Infrastructure Directorate
Temple Quay House
Bristol
BS1 6PN

To make an appointment for inspection of the documents contact the Planning Inspectorate on 0303 444 5000 or email NIEnquiries@planninginspectorate.gov.uk.

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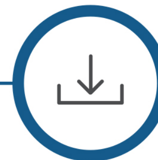

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